



JOB TITLE	WILLS, PROBATE, TAX & TRUST SPECIALIST
REPORTS TO	Head of Department & Directors
LOCATION	Towcester with some travel to Market Harborough and to clients

Recognised as a *Leading Firm* by the Legal 500 and *Top Ranked* in Chambers & Partners UK, we are a Firm of likeminded individuals who are strongly dedicated to meeting our clients' needs. We provide our clients with personalised service bespoke to their needs with skilful guidance. We would like to hear from you if you are of a similar orientation and have the skills and experience required to fill this role.

The primary duties attached to the position include:

- Dealing with various aspects of private client workload including estate planning, expert and strategic tax advice, complex will drafting & LPA, succession planning, as well as guidance on the use of trusts.
- Specialist advice to clients, including our elderly and/or vulnerable clients on Lasting Powers of Attorney, Court of Protection Work and Estate administration
- Probate and administering Trusts and Estates
- Advising clients and colleagues on inheritance and capital gains tax issues
- Providing clients with accurate and up to date legal advice in all matters relating to Will, Trusts, Tax, Probate & Estate Administration
- Working with others to contribute to the overall profitability of the Firm, including contributing to practice development/marketing ideas. This requires active involvement in the growth and further development of the Team
- Assisting and/or mentoring junior Fee Earners on the team in drafting complex wills and relevant documentation
- Undertaking any other relevant and associated duties specified by the Directors

PERSON SPECIFICATION:

Requirement	Essential/ Desirable?
<p>Qualifications / Education :</p> <ul style="list-style-type: none"> • Qualified Solicitor/CILEx with at least 5 years PQE or proven track record of extensive experience • STEP Qualification 	<p>Essential</p> <p>Desirable & highly advantageous</p>
<p>Experience:</p> <ul style="list-style-type: none"> • At least 5 years' experience of handling a substantive Wills, LPA, Tax Planning, Estate Administration and Probates Caseload • Up to date experience in all matters relating to Wills, Probate, Estate Admin, Inheritance Tax and the ability to hit the floor running • Experience of using a computerised case management system • Experience of drafting and subsequent administration of complex Wills and other related documentation • Providing clients with quality advice on inheritance tax, elderly care planning and related issues 	<p>Essential</p> <p>Essential</p> <p>Desirable</p> <p>Essential</p> <p>Essential</p>
<p>Knowledge:</p> <ul style="list-style-type: none"> • Extensive knowledge of Wills, Probate, Tax and Trust legislations • Competent and up to date knowledge of Estate Planning, LPA, Court of Protection & other areas of Wills and Probate work • Ability to develop knowledge of the Agricultural law aspects of Wills, Probates and Estate Admin. 	<p>Essential</p> <p>Essential</p> <p>Essential</p>
<p>Skills & Competencies:</p> <ul style="list-style-type: none"> • Excellent Client Care and communication skills • Computer Literate • Ability to work with and within a team 	<p>Essential</p> <p>Essential</p> <p>Essential</p>

<ul style="list-style-type: none"> • Ability to work autonomously and to produce high quality work • Excellent time management skills with strong prioritisation skills and ability to manage own workload • Excellent Microsoft Package and IT skills • Good marketing skills and comfortable with networking • Full UK/EU driving licence and own transport 	<p>Essential</p> <p>Essential</p> <p>Essential</p> <p>Essential</p> <p>Essential</p>
<p>Personal Attributes:</p> <ul style="list-style-type: none"> • Great personality and effective communication skills • Ability to make decisions using own initiative • Able to work and thrive in a focussed but friendly and supportive environment • Creative, comes up with innovative ideas • Strong commercial acumen and focus • Continued personal and professional development • Ability and willingness to play a significant role within the firm 	<p>Essential</p> <p>Essential</p> <p>Essential</p> <p>Desirable</p> <p>Essential</p> <p>Essential</p> <p>Essential</p>
<p>Other:</p> <ul style="list-style-type: none"> • Ability to commute reliably to Towcester and Market Harborough office • Ability to conduct client visits mainly within the East Midlands area • Punctuality and reliability 	<p>Essential</p> <p>Essential</p> <p>Essential</p>